

## Department of Financial Protection and Innovation

### Position Duty Statement

DFPI HRO 203 (Rev. 07-2021)

<b>NAME</b>	<b>EFFECTIVE DATE</b>
<b>CLASSIFICATION TITLE</b> Staff Services Manager I	<b>POSITION NUMBER</b> 410-114-4800-001
<b>WORKING TITLE</b> Acquisitions Manager	<b>DIVISION/OFFICE/UNIT/SECTION</b> Administrative Divisions/Business Operations Office
<b>BARGAINING UNIT</b> S-01	<b>GEOGRAPHIC LOCATION</b> Sacramento

**General Statement:** Under the general direction of the Acquisitions and General Services Manager (SSM II), Business Operations Office (BOO), the Staff Services Manager I (SSM I) plans, organizes, directs the acquisitions activities of the BOO and facilitates the more complex duties associated with oversight, monitoring and support with the overall execution of contracts and purchases. This position calls for a high degree of diplomacy, confidentiality and trust to successfully fulfill the requirements of the position. Duties include, but are not limited to, the following:

#### A. Specific Assignments [Essential (E) / Marginal (M) Functions]:

**35% (E)** Plans, organizes, and supervisors the work of Acquisitions Analysts who are responsible for the overall execution of Non-IT and Information Technology contracts and purchases of goods and services. Incumbent reviews and approves Acquisitions Analyst's contract and purchase order documents, (statement of work, bids, proposals, quotes) submitted by Program; ensuring contracts and purchases follow proper Departmental policy and procedures, State Administrative Manual (SAM), State Contracting Manuals (SCM), Government Codes and are in compliance with control agencies such as Department of General Services, CalHR and State Controller's Office.

Develops training tools related to contract and purchase order execution and efficiencies such as contract manager training guides, contract templates, file checklists; establishes unit goals related to Small Business/Disabled Veteran Business Enterprises and CalE-Recycle participation; monitors results in order to make improvements upon processes in order to meet all SB/DVBE /Recycle goals and to comply with SCM requirements.

Maintains working knowledge of departmental databases such as Lotus and Fiscal; Attends Cal E Procure and Fiscal training sessions along with the Acquisitions Analysts to ensure processes and database functionalities are current.

**25% (E)** Responsible for planning, organizing, and directing the Acquisition Unit in the functions related to: Locating goods that comply with the Buy-Recycle Program; Adhering to the requirements set forth in the State Contracting Manual(s) related to

Contracting/Service Acquisition Program and the Purchasing/Goods Acquisition Program; and Educating Program on the benefits of the Small and Disabled Veteran Business Enterprise program. This includes maintaining updated information and links on the Departments web page, providing training guides on how/where to locate current lists of SB/DVBE contractors.

Incumbent serves as the key advisor to the SSMII and the Chief of the Business Operations Office providing guidance and oversight on matters related to purchasing, contracting, buy-recycle program and small and disabled veteran business enterprise program.

**25% (E)** Develops the Department's most difficult, detailed, and sensitive personal service contracts and procurements; provides expert advice to the Executive staff on the proper mechanism that is available to contract for personal services (i.e. special consultants, legal representation, expert witnesses, etc.); develops Scope of Work specifications; terms and conditions; develops detailed justification for control agency approval

**10% (E)** Incumbent is responsible for recruiting, hiring, training, and supervising staff. Prepares and updates duty statements; prepares various recruitment documents; participates in the selection of new staff; provides training to staff; evaluates staff performance and provides timely performance evaluations.

Incumbent will provide the necessary level of authority required in the absence of the SSM II to provide proper management of the functions of BOO.

**5% (M)** Performs other related duties as required.

**B. Supervision Received**

The SSM I reports directly to and receives the majority of assignments from the SSM II; however, direction and assignments may also come from BOO Chief.

**C. Supervision Exercised**

The SSMI directly supervises a unit of analytical staff in the performance of acquisition functions.

**D. Administrative Responsibility**

The SSMI performs a full range of supervisory and management duties, including, but not limited to: Maintains working knowledge of departmental databases and an understanding of how they relate to the needs of various laws and programs within the Department; provides guidance and monitors work to ensure timely completion of assignments; evaluates performance of staff by providing regular feedback, establishing development goals and completing timely probationary reports, annual performance appraisals, and individual development plans; monitors employee performance and, if necessary, utilizes progressive

discipline principles and procedures; completes personnel documentation and utilizes the competitive hiring process; and approves or denies administrative requests including leave requests, timesheets, overtime, and training.

**E. Personal Contacts**

The Staff Services Manager I (Supervisor) has frequent contact with: 1) Employees of DFPI 2) General public, vendors, contractors 3) Control Agency (i.e., DGS, CalHR, FISCAL) employees; 4) DFPI Executive staff; 5) Agency

**F. Actions and Consequences**

The actions of the incumbent have a direct bearing on the success, integrity and compliance of the Department's Acquisitions Unit. If the duties and responsibilities described for this position are not performed adequately, negative consequences include:

- 1) Noncompliance with the State Contractor's Manual.
- 2) Not meeting the State's mandates for Buying Recycled products and goals for usage of Small and Disabled Veteran Businesses.

**G. Functional Requirements**

The incumbent works in an office or telework setting. The use of a personal computer, telephone, copier and scanner is essential to the duties of this position. The position requires bending and stooping to retrieve files, sitting, and standing consistent with office work, and light lifting of no more than 25 lbs.

**H. Other Information**

The Staff Service Manager I is expected to exercise good judgment in decision-making, exercises creativity and flexibility in problem identification and resolution, and manages time and resources effectively. Works well with others, under changing priorities. Regular attendance and punctuality are essential. Possesses good written and verbal communication skills.

**CONFLICT OF INTEREST**

*If the position is subject to the Statements of Economic Interests (Form 700), language pertaining to the COI designation should be inserted here as follows:*

*This position is subject to Title 16, section 3830 of the California Code of Regulations, the Department of Financial Protection and Innovation's Conflict of Interest Regulations. The incumbent is required to submit a Statements of Economic Interests (Form 700) within 30 days of assuming office, annually by April 1st and within 30 days of leaving office.*

**I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation.** (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety analyst.)

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Employee Signature

Date

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Employee's Printed Name, Classification

**I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.**

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Supervisor Signature

Date

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Supervisor's Printed Name, Classification